

Personal Income Tax Checklist

This list is by no means complete, as a complete list of income and deductions may vary depending on your unique situation, we encourage you to please contact us with any questions you may have.

We are here to help you maximize your refund with every tax credit and deduction you're entitled to.

CHECKLIST TO HELP YOU:

1 Slips

- T4 Employment income
- T4E Employment insurance benefits
- T3, T5 Interest, dividends, mutual funds
- T2202A Tuition / education receipts
- RC62 Universal Child Care Benefit
- T4A-OAS, T4AP Old Age Security and QPP benefits
- T4A Other pensions and annuities
- T5007 Social assistance payments
- T5007 Workers' compensation benefits
- T101, T102, T5103 from Exploration & Development Expenses
- All other income slips

2 Receipts

- RRSP
- Support Payments
- Professional & union dues
- Tool expenses (Tradespersons)
- Medical expenses
- Bus or Transit pass
- Donations
- Political contributions
- Child care
- Adoption
- Children's arts and sports
- Moving
- Interest paid on student loans
- Carrying charges and interest expenses
- Home office expenses
- Exams for professional certification.

- ③ **Other documentation**
- Notice of Assessment/Reassessment
 - Canada Revenue Agency correspondence
 - Sale or deemed sale of stocks, bonds or real estate
 - Northern residents deductions
 - Rental income and expense records
 - Business, farm or fishing income/expenses
 - Automobile / Travel logbook and expenses
 - Disability Tax Credit Certificate
 - Declaration of Conditions of Employment (T2200)
 - Volunteer Firefighters certification

